

# Wealth Management Report

Total Invested: \$38181.33

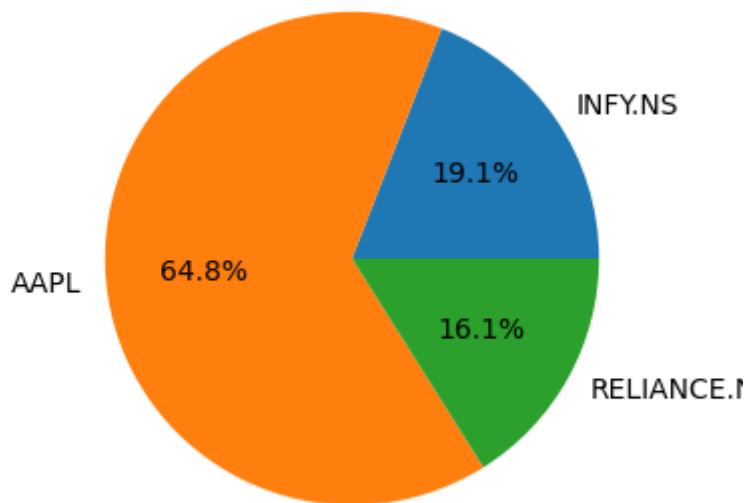
Current Value: \$35775.39

Profit / Loss: \$-2405.94

Best Asset: RELIANCE.NS (-1.47%)

Worst Asset: AAPL (-6.68%)

Asset Allocation



## Goals

Goal Type	Target Date	Target	Saved	Progress %
education	2027-02-19	\$250000.00	\$20000.00	8.0%
home	2028-01-08	\$800000.00	\$0.00	0.0%
custom	2026-12-09	\$100000.00	\$0.00	0.0%

## Recent Transactions

Symbol	Type	Qty	Price	Fees	Date
RELIANCE.NS	sell	1.0	\$1458.50	\$0.00	2026-02-10 17:27:27.647013

RELIANCE.NS	buy	5.0	\$1458.50	\$0.00	2026-02-10 17:27:04.149134
AAPL	buy	1.0	\$24858.33	\$0.00	2026-02-10 17:25:28.701900
WALLET	contribution	1.0	\$50000.00	\$0.00	2026-02-10 17:24:55.325808
INFY.NS	buy	5.0	\$1497.80	\$0.00	2026-02-10 17:22:44.447239